BACKGROUND

The following is a checklist of the items and requirements to navigate the IT Project Management (PM) Framework Lifecycle.

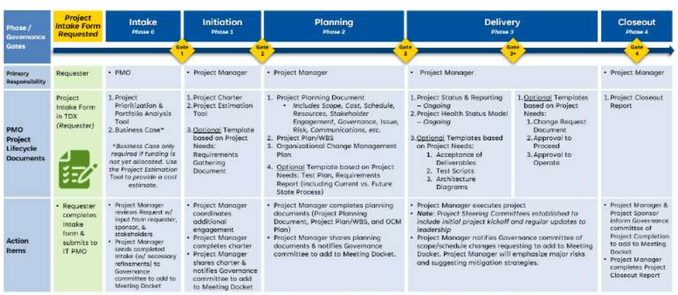
For additional information, please go to: *sites.udel.edu/it-pmo/*
or contact: *it-pmo@udel.edu*

PROJECT MANAGEMENT FRAMEWORK

The IT Project Management (PM) Framework consists of:

- **Project Phases** – Defined phases of the lifecycle, each with a specific purpose, deliverables, and required actions to advance forward
- **Action Items** – Required activities within each phase to ensure compliance and consistency across all projects
- **Project Templates** – Standardized documents for capturing and tracking project data throughout the lifecycle

For more details, please review the **Detailed One-Pager**.



PROJECT PHASES

The IT PM Framework Lifecycle consists of four phases:

1. **Intake* (Phase 0)–** Captures the business need
2. **Initiation (Phase 1)** – Document project deliverables andresources needed
3. **Planning (Phase 2)** – Develop the project schedule, assign resources, and clarify risks
4. **Delivery (Phase 3)** – Execute project work and monitor and control progress
5. **Closeout (Phase 4)** – Capture lessons learned and document project successes

**Separate and distinct from the Project Management Framework Lifecycle*

PMO ROLE TYPES

The PMO's level of involvement varies based on the nature and complexity of the effort. There are three PMO role types:

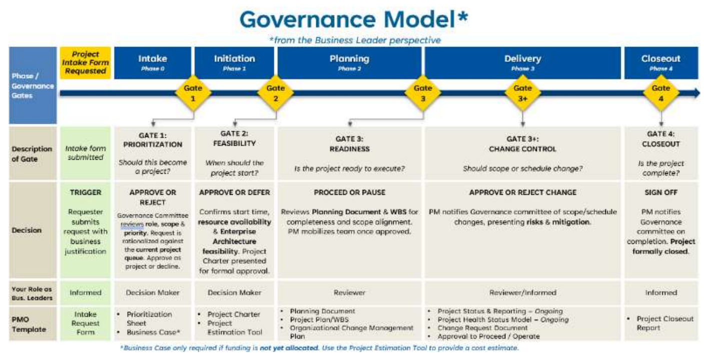
- **Driven:** PMO leads and manages the project directly with a dedicated Project Manager
- **Involved:** PMO provides support and oversight; project workstreams are led by the requesting team with PMO participation
- **Aware:** PMO is informed for portfolio visibility; does not actively manage the work

PROJECT SIZE

Project size is determined by four factors: **Expected Cost, Duration, Project Involvement,** and **Risk / Impact**.

Size drives minimum project management, status reporting, and documentation requirements. Size is validated at Gate 2. Please refer to the project size model for accurate calculation.

GOVERNANCE MODEL / GATES



The Governance Committee oversees five gates throughout the lifecycle, each serving as a formal checkpoint before advancing to the next phase. For more details, please review the **Governance Model One-Pager**.

- **Gate 1: Prioritization** – Should this become a project?
- **Gate 2: Feasibility** –When should the project start?
- **Gate 3: Readiness** – Is the project ready to execute?
- **Gate 3+: Change Control** – Should scope or schedule change?
- **Gate 4: Closeout** – Is the project complete?

TEMPLATES

The IT PM Framework includes the following lifecycle templates to satisfy the project management deliverables. All templates are available at sites.udel.edu/it-pmo/.

#	Template Name	Lifecycle Phase	Primary Responsible
1	Project Intake Request Form	Intake	Requester
2	Project Prioritization & Portfolio Analysis Tool	Intake	PMO Project Manager
3	Project Charter*	Initiation	PMO Project Manager
4	Project Estimation Tool	Initiation	PMO Project Manager
5	Project Planning Document*	Planning	PMO Project Manager
6	Project Plan / WBS	Planning	PMO Project Manager
7	Organizational Change Management (OCM) Plan*	Planning	PMO Project Manager
8	Project Status and Reporting (Ongoing)	Delivery	PMO Project Manager
9	Project Health Status Model (Ongoing)	Delivery	PMO Project Manager
10	Project Closeout Document	Closeout	PMO Project Manager

*****Note****: Light versions of key documents are available for 'Small' projects to reduce administrative burden while still meeting PMO standards.*

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PROJECT MANAGEMENT CHECKLIST

This is a checklist of items for project managers to assist with tracking project management activities and complying with the IT Project Management (PM) Framework.

For additional information, please go to: *sites.udel.edu/it-pmo/* ***or contact:*** *it-pmo@udel.edu*

INTAKE (PHASE 0)

Portfolio Request Lifecycle: *Intake*

- ☐ Requester completes & submits Project Intake Request Form
- ☐ PMO reviews request with input from requester, sponsor, & stakeholders
- ☐ PMO completes/utilizes the Project Prioritization & Portfolio Analysis Tool
- ☐ If funding is not allocated: Requester completes Business Case using Project Estimation Tool
- ☐ PMO sends completed Intake Form (w/ necessary refinements) to Gov. Committee for Gate 1 docket

GATE 1 (PRIORITIZATION): SHOULD THIS BECOME A PROJECT?

- ☐ PMO and/or Requester presents the Project Intake Request to Gov. Committee
- ☐ Gov. Committee reviews role, scope, and priority
- ☐ Request rationalized against current project queue using Project Prioritization & Portfolio Analysis Tool
- ☐ Gov. Committee approves or declines the request
- ☐ If approved: Project added to PMO inventory
- ☐ PMO posts project to Project Inventory System

INITIATION (PHASE 1)

Portfolio Request Lifecycle: *Accepted*

- ☐ Project Manager (PM) coordinates engagement with requester, sponsor, and stakeholders
- ☐ PM completes Project Charter
- ☐ PM completes/utilizes the Project Estimation Tool
- ☐ PM submits Project Charter to Gov. Committee for Gate 2 docket

GATE 2 (FEASIBILITY): WHEN SHOULD THE PROJECT START?

- ☐ PM presents the Project Charter to Gov. Committee for formal approval
- ☐ Gov. Committee reviews resource availability & Enterprise Architecture feasibility
- ☐ Project start date confirmed or deferred
- ☐ PM posts approved Project Charter to Project Inventory System

PLANNING (PHASE 2)

Portfolio Request Lifecycle: *Scheduled / Active*

- ☐ PM Completes Project Planning Document
- ☐ PM Completes Project Plan / WBS
- ☐ PM Completes OCM Plan
- ☐ Planning documents shared with Governance Committee for Gate 3 docket

GATE 3 (READINESS): IS THE PROJECT READY TO EXECUTE?

- ☐ PM presents Project Planning Docs to Gov. Committee
- ☐ Gov. Committee reviews Planning Document & WBS for completeness
- ☐ Gov. Committee approves to Proceed or Pause
- ☐ PM posts Planning Documents to Project Inventory System
- ☐ PM mobilizes team & formally begins execution

DELIVERY (PHASE 3)

Portfolio Request Lifecycle: *Active*

- ☐ PM executes project per approved project schedule
- ☐ Establish *Project Steering* Committee, initial kickoff and regular leadership updates
- ☐ Complete project deliverables per schedule PM updates Project Status in Project Inventory System (bi-weekly minimum)
- ☐ PM utilizes the Project Health Status Model (Green / Yellow / Red) for consistent status reporting
- ☐ PM prepares and delivers status updates to leadership as required

GATE 3+ (CHANGE CONTROL): SHOULD SCOPE OR SCHEDULE CHANGE? *(AS NEEDED)*

The Change Request Document is used to formally request, document, and track proposed changes to an approved project's scope, schedule, or budget.

- ☐ PM completes Change Request Document
- ☐ Steering Committee & Executive Sponsor review and approve or reject
- ☐ PM presents major risks & mitigation strategies to the Gov. Committee
- ☐ Gov. Committee conducts formal review
- ☐ PM posts Change Request to Project Inventory System

CLOSEOUT (PHASE 4)

Portfolio Request Lifecycle: *Active*

- ☐ PM completes Project Closeout Report
- ☐ PM and Project Sponsor notify Gov. Committee for Gate 4 docket

GATE 4 (CLOSEOUT): HAS THE PROJECT MET ITS OBJECTIVES?

- ☐ PM presents Project Completion to Gov. Committee
- ☐ Gov. Committee confirms project completion & sign-off
- ☐ PM posts Closeout Report to Project Inventory System
- ☐ PM completes final project status update; designate **Portfolio Request Lifecycle to: Operational / Closed**